What's New in DocuWare Version 6.9
# Contents

1 Storing Documents ................................................................. 5

1.1 Scanning and Storing ........................................................................ 5
  1.1.1 Import Configurations: Identification........................................ 5
  1.1.2 Document Preview........................................................................ 6
  1.1.3 Using Filtered External Select Lists when Storing..................... 7

1.2 Email Management .......................................................................... 10
  1.2.1 Removing Embedded Attachments from the Archiving..................... 10

2 Finding and Displaying Documents .................................................... 11

2.1 Get link to a document or result list ................................................... 11

2.2 Maintain the zoom factor in document view........................................ 12

2.3 Functions for Document History.......................................................... 12

2.4 Displaying All Document Trays in Windows Explorer......................... 13

2.5 "Open with" Command in Windows Explorer Client .......................... 13

3 Workflow: Controlling Business Processes Professionally ....................... 14

3.1 Web Service: Retrieving Several Parameters at Once.......................... 14

3.2 Keyword Field for Forms.................................................................. 14

3.3 Form Fields with Read Permission...................................................... 15

3.4 New Variables.................................................................................. 16

3.5 Default Decision for Workflows.......................................................... 17

3.6 Access Task Lists in DocuWare Mobile................................................. 17

4 Teamwork ....................................................................................... 19

4.1 Web Forms for External Users............................................................. 19

4.2 Attaching Files to Web Forms............................................................. 19

4.3 New Fields for Web Forms................................................................. 21
5 Other New Features and Improvements

5.1 Managing DocuWare

5.1.1 Modified System Requirements

5.1.2 Changes in Installation and Upgrade

5.1.3 Program for Improving User-Friendliness

5.1.4 New Field Types and Extensions of Fields

5.1.5 More functions for the file cabinet administration

5.1.6 User Administration in DocuWare Configuration

5.1.7 Simplified Functions in DocuWare Administration

5.2 Usability Improvements

5.2.1 "First Steps" tutorial for new users

5.2.2 New Help Link in Main Menu

5.2.3 Improved Logging In to Configurations

5.2.4 Optimized Processing of Incorrect Jobs

5.2.5 Automatic Activities with Error Output

5.2.6 Workflow Designer: Login no longer needed
1 Storing Documents

1.1 Scanning and Storing

1.1.1 Import Configurations: Identification

Component: Import Configurations

Similar to the DocuWare Printer, Import Configurations can now automatically identify which import configuration should be run. Specify the rules for this on the new Identification page: Identification is achieved through text criteria that you specify, the file name, and/or the directory containing the document.

Application

Your ERP system creates different types of documents and stores these in a directory as PDF files. For every document type, you have created a configuration that recognizes the document type through text criteria such as "invoice," "credit note," or "delivery note." DocuWare Import can now import all of these files automatically, as it immediately recognizes which import configuration should be run for each individual document.

Benefits

- A single import folder is sufficient
- Faster, easier work

How to use the function

Step 1: Enable automatic selection of the configuration on the "Import" page.
Step 2: On the "Identification" page, make the settings for selecting the configuration.

1.1.2 Document Preview

Component: DocuWare Scan

Before you upload your scanned document, you can display it in a large preview. Several pages can also be separated using the Split here button. All of the functions that were previously only available for the "small" document display, e.g. rotating or deleting pages, are available to you in this preview.

Application

When scanning your invoices, you want to ensure that all pages have actually been scanned correctly. You can make sure of this by looking at the preview pages and can re-scan pages that were not correctly inserted, for example.

Benefits

- Quicker scan verification
- Easier correction of scanning errors
How to use the function

There are two ways of accessing the preview: either double-click on the respective page or open the context menu by right-clicking on the page and selecting "Preview." Here you can separate documents as well as turn or delete pages.

1.1.3 Using Filtered External Select Lists when Storing

Component: Web Client

Select lists of local files or external databases can now be filtered. In doing so, the select list of a field in the store dialog is dynamic, based on the entries of other fields.

Application

In your company, data about your business partners is maintained in a CRM system. An employee now archives a supplier's invoice and enters the name "Flying Tom" in the Company field. For the Contact field, the employee is offered the contacts from the CRM as a select list. As the select list is filtered, he only sees the contact saved for "Flying Tom."
Example for filtering: The select list offers entries dependent on the "Company" field for the "Contact" field.

With filtered select lists, typographical errors and duplicate index entries are reduced and the company's database stays consistent. The CRM data on the supplier are still available for indexing even if no document has been stored yet with these index data.

**Benefits**
- Faster indexing
- Consistent data in the file cabinet
- Leverage data already used within the company
- Use index entries and filtering when storing the first document in the file cabinet

**How to filter an external select list**

The filter for an external select list is set up in DocuWare Configuration in the *File cabinets* area.
To filter the select list for a field, under "Storage" call up the properties of the desired field and configure the filter here.

In order for an external select list to be filtered, it must be based on a multi-column table or list in CSV or TXT format. You can also use a database connection to import the select list. DocuWare supports MSSQL, MySQL, Oracle, and ODBC.

You now have three options for creating external select lists: in DocuWare Administration, in the file cabinet area of DocuWare Configuration, or in the new module Select lists in DocuWare Configuration.

The functions are the same, with one exception: External select lists can only be filtered in the file cabinet area of DocuWare Configuration.
1.2 Email Management

1.2.1 Removing Embedded Attachments from the Archiving

Component: Connect to Outlook

In Microsoft Outlook, images can be attached to an email as a file or embedded in the message text. Connect to Outlook can generally remove embedded images from storage.

Application

Embedded images are often logos from signatures or other graphic elements which the sender did not add themselves. In order to prevent these graphic elements being stored as separate files in the file cabinet, as they are not important in terms of content, you can block these from the archiving.

Benefits

- Only images from the attachment are archived
- No irrelevant graphic elements are stored as separate files

How to enable the function

In the storage configuration on the Options 2 tab, enable the function Exclude attachments – remove images embedded in email body.
2 Finding and Displaying Documents

2.1 Get link to a document or result list

Component: Web Client

The hyperlink to an archived document or a result list can now be obtained directly, copied to the clipboard, and then inserted into other documents, programs, or Wiki articles.

Applications

- Add a link to an invoice in the DocuWare file cabinet for fast access to posting, delivery note, etc. in the ERP system.
- Use a link to insert all reports into a project team's log.

Benefits

- Use links to documents or result lists directly
- Simple linking between DocuWare and other areas

How to use the function

The function "Get document link" can be found in the context menu of a document and in the viewer toolbar.

You will find the function "Get result list link" (2) in the options for the result list (1).
Every link appears in an editing field from which you can copy it.

2.2 Maintain the zoom factor in document view

Component: Viewer

If you set a zoom factor for viewing a document, this is automatically saved for the following document.

**Benefits**
- Immediately display individual documents at the right zoom level
- Work faster

2.3 Functions for Document History

Component: Web Client

As before, it is still possible to select settings in Administration to show or hide certain functions which are displayed when viewing a result list. Now these settings will also appear in the document history.

**Benefit**
- More convenient

**How to use the function**

Preferred functions such as "Print" or "Copy to" can now also be used directly when working with document versions.

All functions enabled in Administration for the result list automatically apply for the document history, if they are relevant for this area. No further settings are necessary.
2.4 Displaying All Document Trays in Windows Explorer

Component: Windows Explorer Client

All DocuWare document trays are now also displayed in Windows Explorer. The order can be adjusted.

**Benefit**

- Copy and move documents easily between the document trays, even in Windows Explorer Client

**How to use the function**

With "Adapt View..." a dialog opens where you can activate document trays and the folder views for Windows Explorer Client.

2.5 "Open with" Command in Windows Explorer Client

Component: Windows Explorer Client

The *Open with* command for documents known from Windows is now also available to you in DocuWare. You can use it to select the program for opening an archived document.

**Application**

In Windows Explorer Client, an image opens with a double-click as standard in Windows Photo Viewer – you set this in Windows. If you now want to edit an image, open the desired image editing program using *Open with*.

**How to use the function**

In Windows Explorer Client, right-click on an archived document and select *Open with* from the context menu.
3 Workflow: Controlling Business Processes Professionally

3.1 Web Service: Retrieving Several Parameters at Once

Component: Workflow Manager

When configuring a web service, you can transfer and retrieve several parameters at the same time. This means that considerably more information can be used in your workflow at once.

Application

You not only want to automatically enter the invoice amount in the form in your accounts payable workflow, but also the invoice date and number from an external data source.

Benefits

- Use more information in a workflow at the same time
- Easier integration in other applications

3.2 Keyword Field for Forms

Component: Workflow Manager

There is a new keyword field in which several text entries can be shown in a list.

Benefits

- Better overview of entries
- Easier assignment of several entries at once
- Improved support for keyword index fields in a workflow
How to use the function

3.3 Form Fields with Read Permission

Component: Workflow Manager

In forms, fields with write protection can be released for read access only.

Application

In the invoice workflow, the user should be shown which amount was previously authorized when an invoice was processed. It should not be possible to change this value, so you set this field as read-only when setting up the workflow.

Benefits

- Users can receive more information
- Tasks can be completed faster
How to use the function

You can set up read-only for a field in the decision under "Form."

The field entry is now shown grayed out.

3.4 New Variables

Component: Workflow Manager

There are the following new features for the variables:

- **New global variables "Date with time" and "Decimal number":**
  With the new field types "Date with time" and "Decimal number" in DocuWare, you can also use variables with these exact names in workflows (more about the new field types (on page 23)).

- **New system variable "Task user":** With the new system variable "Task user," you can store the name of the user currently working on the task in DocuWare Client in a workflow. This means that the task can be transferred back to the user at a later point. *Example:* When processing insurance claims, individual circumstances must be checked from time to time. Meanwhile, the insurance claim may not be processed by any other user. In order to ensure this, select a task and assign it to yourself. Your user name may already be filled out in the form with the variable "Task user." As a user, this means that you only need to open the task to be able to assign it to yourself with one click.

The new variable must be distinguished from the existing "Current user" variable containing the most recent active user, i.e. the user that last edited the task in DocuWare Client.
3.5 Default Decision for Workflows

Component: Workflow Manager

In workflows, you can define a decision as a default, so that the task administrator does not need to select a decision every time.

**Benefit**

- Decisions are processed faster

**How to use the function**

Enable the function under “Decisions > General”.

3.6 Access Task Lists in DocuWare Mobile

Component: DocuWare Mobile

With the new version of DocuWare Mobile, you can also edit the Workflow Manager tasks on a smartphone. Workflow decisions can be completed with stamps as usual. This applies for the current devices: DocuWare Mobile is available from iOS 8, Android 4, and Windows 8.1.
In DocuWare Mobile you can quickly access your lists, tasks and searches.

**Application**

You often have to approve invoices with tight terms of payment. The invoices should pass through the workflow as quickly as possible so that the cash discount does not expire. However, you are on the move a lot and typically only have your smartphone easily at hand. No problem, as you can easily access your task list with this device using DocuWare Mobile. You check the invoice, approve the amount or a partial amount, and the document can already be passed on in the workflow.

**Benefits**

- Access task lists while on the move
- The workflow does not come to a standstill at the office if an employee is absent

**How to use the task lists**

Connect your device to DocuWare – this is easy to do by pointing your camera at the QR code in the main menu of DocuWare Client. Your task lists are then automatically available to you in the mobile client. Open a document from the task list in the viewer to edit it with a stamp.
4 Teamwork

4.1 Web Forms for External Users

Component: DocuWare Forms

If you are using DocuWare Cloud you can fill out a Web Form and send it to DocuWare without having an own access to DocuWare.

This function is only available in DocuWare Cloud systems.

Applications

- The data for new employees can already be recorded before DocuWare access has been set up for them. This means that data is available to all responsible departments in the company in advance.
- A company provides a Web Form for applications on its careers website. The incoming applications are archived and indexed directly in DocuWare.

Benefits

- Easy linking of data from external employees, partners, or customers
- Accelerated information flow

How to set up the function

In DocuWare Configuration, enable the option Public form for the Web Form. In the configuration, you also enter a DocuWare user whose account is used to save the transmitted forms. It is recommended that you create a new user for this. This is possible in DocuWare Administration or in DocuWare Configuration.

4.2 Attaching Files to Web Forms

Component: DocuWare Forms

One or several files can be attached when filling out a Web Form.

Applications

- One employee in the sales team fills out a Web Form for reimbursement for his expenses on his business trip. He sends the scanned hotel and taxi receipts with the form so that the request can be processed promptly.
- A company provides an application form on its careers website. Applicants can send other documents such as a resume or references as well as their letter.
Benefit

- Link receipts and other documents directly with a Web Form

How to configure the function

Include the *Attach file* option on the *Designer* tab of a Web Form configuration.

A maximum size and number of attachments can also be set in the configuration. You can also define which file types may be uploaded.
4.3 New Fields for Web Forms

Component: DocuWare Forms

Three other field types are available with Date, Fixed text, and Signature for recording data with a Web Form:

- **Date**: As in the Web Client, you can set the date with the date selector.
- **Predefined text**: This field type is suitable for comments on filling out fields or for fixed text such as general terms and conditions of business.
- **Signature**: The user confirms the authenticity of the entries in this field with his signature. The Web Form can be signed on a touchscreen, for example. When it is transferred, the signature is inserted as an image into the PDF of the Web Form.

**Benefit**

- Configuring the forms is even more versatile

**How to configure the fields**

The new field types are inserted in DocuWare Configuration when setting up a Web Form.
5 Other New Features and Improvements

5.1 Managing DocuWare

5.1.1 Modified System Requirements

The PoINT Jukebox Manager is no longer supported from DocuWare Version 6.9.

5.1.2 Changes in Installation and Upgrade

Component: DocuWare Setup

The following new features are available:

- **Upgrade simulation for Workflow Manager database:** Upgrade simulation is now also available for the database of the Workflow Manager module. This increases security during the upgrade.
- **Assign ports more easily:** The new page "Communication Endpoints" in the wizard replaces eight earlier pages which previously specified ports for servers at various points.

5.1.3 Program for Improving User-Friendliness

Components: Setup, DocuWare Administration

As an addition to the regular surveys, the forum, and the focus groups, DocuWare is extending its program for improving user-friendliness (Customer Experience Improvement Program, CEIP).

By participating in this program, you, the customer, can contribute to further improving the quality, reliability, and performance of DocuWare. For this, statistical information about use of the software is collected and transferred to DocuWare at regular intervals. All procedures take place automatically and in the background – participants are never interrupted while working and there is no impact on the system performance.

CEIP reports contain, for example, information on which browser version and language are used, which DocuWare components have been installed, how many file cabinets, document trays, and store dialogs are created in the system, or how many documents are stored on average. This is purely statistical information. No personally identifiable user information or document content whatsoever are transferred.
Benefits

- Support product development and contribute directly to software optimization
- Get software which better meets customer needs

How to participate in the program

Participation in the program to improve user-friendliness is of course voluntary: you can decide whether to participate during setup. You can withdraw at any time in DocuWare Administration under Organization > General.

5.1.4 New Field Types and Extensions of Fields

Components: DocuWare Configuration, DocuWare Administration

New field types

There are two new field types:

- **Date with time**: The field type is suitable for saving the exact time an email was received, for example.
- **Decimal number**: The field type permits the entry of numerical values with up to 27 digits. The maximum numerical value varies depending on the number of decimal places. The field type is therefore suitable for higher or more precise values than those permitted in the numeric field. As before, the latter is limited to 2,147,483,647 for whole numbers or 21,474,836.47 for numbers with two decimal places.

With the two new system field types, variables with the same name can also be used in Workflow Manager (on page 16), for example.

Extensions in keyword and text fields

- You can specify the length of **keyword fields** to a precise number of characters (max. 255 characters).
- Up to 2000 characters can now be entered in **text fields**. You can use longer text fields for saving brief summaries of document contents, URLs, email addresses or similar, for example.
5.1.5 More functions for the file cabinet administration

Component: DocuWare Configuration

The File Cabinets area in DocuWare Configuration has been extended with several functions. These include, among others:

- Creating lists:

![File Cabinets in DocuWare Configuration](image)

- Using fulltext search
- Enabling version management
- Creating new fields
- Creating field masks
- Predefining indexing
- Filtering external select lists (on page 7)
- Creating select lists

External select lists for indexing can also be created in DocuWare Configuration in the "System" area.

You can also configure the file cabinets in DocuWare Administration, as before. The exception is filtering external select lists. This is only possible in DocuWare Configuration.

**Benefit**

- Dialogs and fields can be adjusted more flexibly
5.1.6 User Administration in DocuWare Configuration

Component: DocuWare Configuration

DocuWare Configuration includes the new User Administration area for setting up small and medium-sized organizations. Up to 200 users can be created there and assigned rights for up to 50 roles.

This option is in addition to the options in DocuWare Administration where you may continue to manage organizations with over 200 users and more than 50 roles.

Benefits
- Create users faster
- Assign rights more easily

How to use the function

You will find user administration in the "Personal" area.
Create new users by clicking on the plus sign. A dialog opens in which you enter the user name and email address.

When new users are created, they receive a notification asking them to set their password. The password is set up in the same way as for users who have forgotten their password.

Roles can still be set up before assigning in DocuWare Administration: Organization > User Administration > Roles.

5.1.7 Simplified Functions in DocuWare Administration

Component: DocuWare Administration

The following changes have simplified the administration of DocuWare:

- If you extend your system with a Content Server, you no longer need to assign existing file cabinets to this Content Server. The Content Server is automatically used for every file cabinet. This ensures a balanced load distribution.
- Once a select list has been created, you can now assign this directly to a field at dialog level. The intermediate step of assignment at field level is omitted.
5.2 Usability Improvements

5.2.1 "First Steps" tutorial for new users

Component: Web Client

When you use DocuWare Client for the first time in the new version, a tutorial opens which gives you a quick overview of how DocuWare works.

**Benefits**

- Getting to know common functions
- Working optimally with DocuWare right from the beginning

**How to call up the tutorial**

The tutorial automatically opens after you first log in to DocuWare. It can also be called up through the main menu.
5.2.2 New Help Link in Main Menu
Component: Web Client

The Support & Training area of the DocuWare website can now be called up directly from the main menu.

Extensive range of help: Clicking on "Help" in the main menu leads to a redesigned DocuWare Support page.

Benefits
- Direct path from the software to video tutorials, product blogs, and the help portal
- Extensive range of DocuWare help pooled centrally
5.2.3 Improved Logging In to Configurations

Component: DocuWare Configuration

If you open DocuWare Configuration through a bookmark or desktop link, the language and culture settings set in the Web Client are now automatically supplied. In addition, *Stay logged in* can be enabled during login.

![Login Screen]

**Benefits**

- More convenient log in
- Standard log in for client and configurations
5.2.4 Optimized Processing of Incorrect Jobs

Component: DocuWare Desktop Apps

Manual retry of jobs

DocuWare Desktop Apps will retry failed import jobs automatically, for example if the DocuWare Server cannot be reached. However, if it is not possible to store a document over a longer period of time, it is now also possible to restart the task(s) manually with the new button ... Retry jobs. This ensures that all documents are stored correctly.

How to use the function

Restart the job by clicking "Retry ... failed jobs."

Export file manually

If a document cannot be imported into DocuWare due to an error, you can export it in order to import it into the DocuWare system in another way. This function is an alternative to manually repeating an import job. In the case of a split document, you can still export all documents resulting from the split.

The documents are exported as compressed ZIP files which also contain additional information for error analysis.
How to use the function

In the event of an error, the “Export” function appears.

A dialog opens, in which you can enter the name of the folder for the export or search for the folder directly in the file directory.

5.2.5 Automatic Activities with Error Output

Component: Workflow Manager

You can now specify an error path for every automatic activity in Workflow Designer. This lets you determine what should happen in the rest of the workflow in the event of an error in an activity. Previously an error was only written to the log file and the workflow was canceled.

Benefits

- Even better control of automatic activities
- Increased security in error management

How to use the function

You can specify an error output for the following automatic activities: email, assigning data, assigning users, condition, and Web service.
5.2.6  **Workflow Designer: Login no longer needed**

Component: Workflow Manager

Workflow Designer opens without a login dialog, and you no longer need to log in when you want to edit workflows. The active connection between DocuWare Desktop Apps and your DocuWare system is now used for this.

**Benefits**

- Faster, easier working with Workflow Designer
- A single connection for various DocuWare applications

**How to use the function**

If there is an active connection from DocuWare Desktop Apps to your system, Workflow Designer can be opened easily by double-clicking on its icon. If there is no active connection, open the DocuWare Desktop Apps tray menu and click on *Edit connections* and then on *Establish a default connection* in the new dialog. Or open the main menu in your DocuWare Client and click on *Connect Desktop Apps*. 